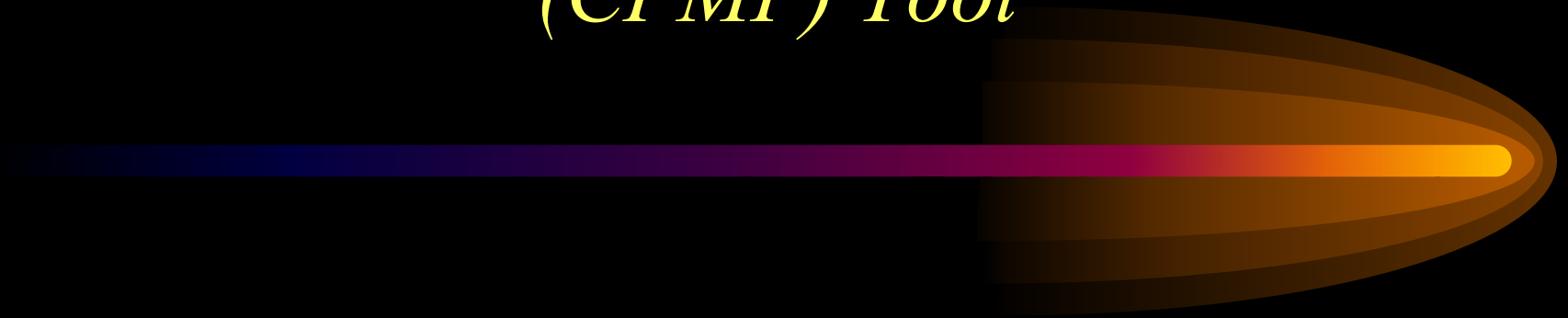# Consolidated Plan Management Process (CPMP) Tool

Consolidated Plan Management Process (CPMP) Tool

Where we started

- Initially evolved from President's Management Agenda (PMA)

- Consolidated Plan Improvement Initiative (CPII) developed from PMA

- Work done with input from CPII Technology Working Group (formula grantees, HUD staff from across country)

Consolidated Plan Management Process (CPMP) Tool

How we worked

- Active role by members from Madison, WI; state of WI; and Lancaster, Co. PA, among other grantees

- HUD CPD Office in St. Louis

- HUD CPD office in Madison, WI continues to make valuable contributions

Consolidated Plan Management Process (CPMP) Tool

How we worked

- Beta tested within working group

- Draft version available via NCDA website in early 2004

- Latest version…much improved over the earlier prototype

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Development mindset:

- Defined problem

- Defined what could/should be changed

- Assumed no change in regulations or statutes

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Development mindset:

- Developed from the bottom up
- HUD field staff developed V.1
- Changes based on grantee input
- OMB desire: Stakeholders develop better performance measurement processes

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Development mindset:

- HUD HQ staff involved as well
  - HQ IT staff developed V.1.1 and V.1.2 with field staff input
  - HQ program area directors reviewed

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Solution:

- Should be "cradle to grave"
- Plan, implement, evaluate, and repeat cycle

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Approach:

- Combine Strategic Plan, all Annual Action Plans, and CAPER into one electronic template

- Look at the forest first; then the trees and leaves

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Result:

- Template meets requirements for narratives and data

- Minimizes grantee need to check regulations for completeness

- Questions are already there

Consolidated Plan Management Process (CPMP) Tool

Considerations:

- Use is optional
  - format discretionary
  - content is not

Consolidated Plan Management Process (CPMP) Tool

Considerations:

- Submit final plan electronically
- User support
  - HUD Web site designed for ease of use
  - Includes user's manual, instructions, etc.

Consolidated Plan Management Process (CPMP) Tool

Customer focused:

- Grantees spend valuable time where it matters…getting results

- Appropriate for use by all formula grantees

Consolidated Plan Management Process (CPMP) Tool

Features:

- Easy to use template

- Guides user through questions requiring text, and tables requiring data input

- Easily compare data to determine areas of greatest need

Consolidated Plan Management Process (CPMP) Tool

Features:

- Links from Tool to valuable websites, data, definitions, etc.

- OMB desires more data on line

- Like a diary…grantee updates when events occur, money is spent, or outputs/outcomes achieved

Consolidated Plan Management Process (CPMP) Tool

Features:

- Has buttons, drop-down menus, tables with formulas

- Number of files decreased from V.1 to current version

Consolidated Plan Management Process (CPMP) Tool

Features:

- Quantity of files involved is now basically transparent to user

- Enter from "1CPMP" file, which links to all other files

Consolidated Plan Management Process (CPMP) Tool

Features:

- Linkages in Strategic Plan
    - Data input
    - High priority needs
    - Goals
    - Objectives
    - Outcomes for the 3-, 4-, or 5-year cycle
    - Projects

Consolidated Plan Management Process (CPMP) Tool

Features:

- Annual Action Plan
  - Budget
  - Proposed outputs/outcomes for the year
  - Beneficiaries
  - Ties back to funding sources, amounts, national objectives to be achieved, matrix codes, proposed/actual outputs per year, status, timing

Consolidated Plan Management Process (CPMP) Tool

Features:

- Allows for addition of other optional information
  - Maps
  - Photos
  - Charts
  - Additional text that be cut/pasted

Consolidated Plan Management Process (CPMP) Tool

Benefits:

- Standardized format, content defined by regulations/statutes

- Still allows for flexibility in use of funds

- Easy to monitor timeliness, and determine where deficiency exists

Consolidated Plan Management Process (CPMP) Tool

Benefits:

- Measure/report on dollars spent
  - Program area
  - Project
  - Neighborhood
  - Census tract/block group
  - Congressional district
  - State
  - Beneficiaries

Consolidated Plan Management Process (CPMP) Tool

Benefits:

- Expenditure comparisons
  - Budget to actual expenditures
  - Expenditures to outputs
- Completion of Tool = Meeting minimum required by regulations/statutes
- Can use all or part of Tool

Consolidated Plan Management Process (CPMP) Tool

Benefits:

- Best if start with PY 1, but can start later
- Can break out pieces and delegate work to other staff/other departments complete
- Must have only one copy or links will not work

Consolidated Plan Management Process (CPMP) Tool

Benefits:

- Eliminates redundant key stroking through relational fields (enter once, and fills in data in other places in Tool)

- Allows for carryover of projects between program years

Consolidated Plan Management Process (CPMP) Tool

Benefits:

- "Are we there yet?"…Easy to evaluate and report on status/accomplishments

- In theory, could have a CAPER ready/submitted next day after end of program year

Consolidated Plan Management Process (CPMP) Tool

Benefits:

- Electronic distribution, and hard copy format
- Easy to post to web site for review by citizens during public comment period
- Easy to distribute for use during actual implementation period (Diary-like, most current information will be there)
- HUD can link to the grantee's website for public viewing of plan

Consolidated Plan Management Process (CPMP) Tool

The Future:

- NCDA website to have link back to HUD web site for latest version of Tool

- Assures that only one version available

- Change management on web page

The Future:

- CHAS data automatically populates needs tables

- Report feature based on various queries

- Basis for the "new" IDIS…Add planning feature/performance measurement feature to drawdown feature

Consolidated Plan Management Process (CPMP) Tool

The Future:

- Aggregation of performance data from multiple grantees by:
  - CPD office
  - Region
  - Metro area

- For use by elected officials, HUD, Congress, public interest groups, and citizens

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The Future:

- Pass test as defined by the current Performance Measurement Working Group

- Consider other working groups and initiatives

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The Future:

- Should meet electronic grant submission requirements

- Should be precursor to using Grants.gov

The Future:

- Anticipate an increasing number of grantees preparing Consolidated Plans will use Tool (either in part or its entirety)

- Continue to encourage feedback from users